



City of San Diego



November 1, 2003

Quarterly Report (July – September)
Public Utilities Commission Decision 02-05-046, Rulemaking 01-08-028
Project Reference Number 284-02

I. Program

Whole House Energy Retrofit Incentive Program.

II. Program Description

The *Whole House Energy Retrofit Incentive Program* (the Program) is a local residential program aimed at homeowners who reside in homes constructed before 1978. There are three sub-groups of homeowners within this market that are being targeted by the program: (1) owners who submit plans for an addition or remodel of their home, (2) hard-to-reach homeowners in lower-income areas of the City, and (3) homeowners interested in reducing their energy consumption.

The incentive program is being marketed as a comprehensive package of benefits that includes: (1) the rebates available from San Diego Gas and Electric (SDG&E), (2) information about energy efficiency, (3) design and inspection assistance from the City, and (4) an additional financial incentive offered under this program. The comprehensive incentive offered under the City's program is additive to residential energy efficiency measure incentives available from SDG&E.

The incentive program is a whole-house retrofit plan. Program applicants are currently able to take advantage of three levels of incentives depending on the extent of the retrofit work they select. The third package was introduced through City of San Diego Water Bill mailers beginning April 14, 2003.

- ◆ Package 1. For homeowners who insulate their attic with R-30 insulation, install double-pane windows, install low-flow shower heads and wrap their water heaters (as appropriate) the retrofit incentive will be \$200 to \$600, depending on income level. (See Table 1 for incentive amounts for various income levels)

- ◆ Package 2. For homeowners who do all of the above and also install a new, high-efficient furnace, the retrofit incentive will be \$400 to \$800, depending on income.
- ◆ Package 3. For homeowners who insulate their attic with R-30 insulation, wrap their water heater (as appropriate), install low-e window film on all windows, and replace 50% or 10 (whichever is less) of their incandescent light bulbs with CFL bulbs, the rebate incentive will be \$300 to \$500 depending on income level.

Homeowners are responsible for selection, purchase and installation of the energy efficient materials and equipment required under this program. Information about acceptable energy efficiency levels of materials and equipment is provided in the program information brochures as well as the Program's website.

III. Program Summary Data

1. Aggregated Customer Information

The customer information is available in the Q3 worksheet of the Customer Information Workbook Q3. This customer Workbook contains the information of customers who applied and/or received rebates during this **quarterly reporting period only**.

2. Applications Received and Not Yet Paid

| | |
|--|----------------------------|
| Total Number of applications received Jul-Sept and Not Yet Paid (Committed) | 11 |
| Estimated amount of Rebate Incentives to be paid (Committed rebate and inspection fee dollars) | \$5,100 |
| Estimated demand and energy savings as a applicable (Committed kW, kWh, Therms) | 7kW, 3,203kWh, 1,539Therms |

3. Average Rebate Processing Turn-Around Time

This program is difficult to measure in terms of "turn around time". Simply defined, "turn around time" would be the time it takes to pay out a rebate from the date of initial application to the date the rebate check was created. In this case, the average rebate processing time is 6 weeks. However, our program allows citizens to apply to the Program before construction on their home is complete. This means they can generate a building permit application and be ready to schedule an inspection at their convenience. This makes the "turn around time" appear to be much longer than it needs to be since people apply to the program and they wait several weeks or even months before scheduling an inspection. The average "turn around time" from date of inspection to the date the rebate check is created and mailed to the customer is about 15 days.

4. Total Applications Received

During this reporting period, there were fourteen new applicants, 6 of which have completed the installation of the measures and received rebates. This period our direct marketing material was sent out, and we expect to continue receiving more applications in the next quarter.

IV. Training

Quarter 3 of 2003

The City of San Diego did not conduct any formal training sessions for its staff this quarter. The employee that was hired during the last quarter is continually trained in the reporting skills for the program.

V. Marketing

Quarter 3 of 2003

The largest marketing venture this quarter was the mailing of a Department-wide newsletter, the Curbside Recycler. The design of the newsletter was vastly different from the Whole House Program flyers, and the goal of identifying the Program with the City of San Diego was successful. This newsletter was delivered to over 300,000 City of San Diego residents. Our total customer calls received as a result of the all direct mailings exceeds 1700.

One focus of this quarter was placed on Community Presentations and events. This quarter the list of presentations and outreach events consists of the following:

- 7/10/03, presentation at Peninsula Shepard Senior Center
- 7/15/03, presentation at La Mesa Enrichment Center
- 7/29/03, Meeting/Presentation with Multi Cultural Community staff members (as mentioned in the above category of Administrative Activities).
- 8/12/03, presentation for Cambodian Advisory Committee at 5348 Univ. Avenue
- 8/13/03, presentation for San Diego Asian Youth Org. at 5348 Univ. Avenue
- 8/13/03, presentation for Police Problem Solving, at 5348 Univ. Avenue
- 8/05/03, participated in South Bay Recreation Center, 2003 National Night Out
- 8/10/03, participated in Hillcrest City Fest
- 8/30/03, participate in Silver Wing Recreation Center, 3737 Arrey Drive 8/30/03
- 9/22/03, presentation for Linda Vista Community Planning Committee at 2160 Ulric Street
- 9/25/03, presentation for Hmog Advisory Committee at 5348 Univ. Avenue
- 9/27/03 Adams Avenue Street Fair
- 9/28/03 Adams Avenue Street Fair

The City continues to give out free light bulbs to people who attend the presentations. We did not provide light bulbs at the street fairs and larger events.

Future Community Presentations are being scheduled through Community Planning Committees and Police Station Store Fronts.

➤ **Green Schools Program**

The City of San Diego has been authorized by the CPUC to commit funds from The Program's Marketing budget for the City's existing Green Schools Program. The City of San Diego has committed \$28,800. The Green Schools Program consists of education high school students through in-class lectures and guided energy audits of school facilities. Off campus, there is one service project per school where the students conduct another energy audit of a non-profit community center and lighting retrofits are installed on the selected building. The Green Schools Program also consists of a Youth Forum and a Perception Survey, studying the knowledge of energy conservation perceived prior to education versus post education.

The initial marketing and outreach activities for the Green Schools Program have begun. Schools and teachers who had participated in previous years were contacted, and a list of potential schools was developed. Reaching beyond public schools, private schools like University of San Diego High School were contacted, and a meeting with the unique high schools for homeless children, the Monarch School was held to explore possible partnerships. Meetings to discuss outreach materials for upcoming youth-oriented events like the San Diego Youth Symposium were held. As of September 30, two schools, Torrey Pines and Scripps Ranch, had signed up for the Green Schools Program. No expenses have been incurred as of yet.

VI. Inspections

Quarter 3 2003

There were 6 inspections completed this quarter. All program participants passed inspection on the first round.

VII. EM&V

Quarter 3 2003

The City of San Diego's EM&V consultant submitted their final plan with revisions last quarter. This approval came in early July, upon which the City invoiced SDG&E for the amount of \$139,030.68 as agreed to in the program implementation plan. The City has committed the EM&V budget of \$63,500.

VIII. Budget Summary

The budget summary shown in the table below represents the expenses that have been charged to the Program for **Quarter 3, 2003 ONLY**.

| | CHARGED EXPENDITURES |
|--|-----------------------------|
| Total Administrative Costs | \$62,082.88 |
| Total Marketing/Advertising/Outreach Costs | \$785.05 |
| Total Direct Implementation Costs | \$9,610.46 |
| Total EM&V Costs | \$0 |
| Total Other Costs | \$0 |
| Expenditures Grand Total | \$72,478.39 |

The budget summary shown in the table below represents the expenses that have been charged to the Program **YEAR-TO-DATE**.

| CATEGORY | CHARGED EXPENDITURES |
|--|-----------------------------|
| Total Administrative Costs | \$148,246.10 |
| Total Marketing/Advertising/Outreach Costs | \$59,270.24 |
| Total Direct Implementation Costs | \$17,352.12 |
| Total EM&V Costs | \$0 |
| Total Other Costs | \$0 |
| Expenditures Grand Total | \$224,868.46 |

IX. Percentage of Program Goals

| CATEGORY | % OF PROGRAM GOALS |
|-----------------------|---------------------------|
| % of program spending | 15.52% |
| % of kW goal | 0.1% |
| % of kWh goal | 0.25% |
| % of therm goal | 1.07% |
| % of customer goal | 2.16% |